

Claims

What is claimed is:

1. In an on-line financial screening service, a method of searching a
5 financial database and an intellectual property database in order to find securities
matching user search criteria and relevant intellectual property, wherein the users
access the database over the Internet, the method comprising:

searching the database for records matching financial search criteria
defined by a user; and

10 relaxing at least some of the search criteria, until at least a required number
of matching records are found, wherein the required number of matching records
is never less than one; and

reporting the matching records to the user, including at least one item of
data selected from the groupd consisting of Stock Price, Price/Earnings Ratio,
15 Current Ratio, Debt/Equity Ratio, Cash/Price ratio, Earnings per Share Growth-
1Yr, Earnings per Share Growth-1Yr, Insider Trades, Institutional Holdings %,
Price/Book Ratio, and Price/Cash Flow Ratio.

2. The method of claim 1, wherein the search criteria is suitable for being
delimited between a minimum and maximum.

20 3. In an on-line service, a method for screening financial investment
opportunities, comprising the steps of:

searching a financial database for data records associated with at least one
company based upon a financial search criteria and retrieving the results thereof;

25 searching an intellectual property database for data records associated
with at least one company based upon an intellectual property search criteria and
retrieving the results thereof;

combining the results of the financial database searching step and the
intellectual property database searching step to determine common results on a
30 company basis; and

depicting the combined results.

4. The method of claim 3, wherein the method further comprises the step of analyzing the number of common results on a company basis to determine if the number is greater than zero, and if not

relaxing the search criteria employed in at least one of the searching steps
5 and rerunning the searches so as to obtain a non-zero number of common results.

5. The method of claim 4, wherein the step of relaxing the search criteria is accomplished without user intervention.

6. The method of claim 3, further including the step of maintaining the financial database data records and the intellectual property database records,
10 wherein the step includes periodically launching an automated search of network resources to locate and update financial and intellectual property information; and storing the updated information in the respective database.

7. The method of claim 6, wherein the updated information includes:
at least one item of financial data selected from the group consisting of
15 Stock Price, Price/Earnings Ratio, Current Ratio, Debt/Equity Ratio, Cash/Price ratio, Earnings per Share Growth-1Yr, Earnings per Share Growth-1Yr, Insider Trades, Institutional Holdings %, Price/Book Ratio, and Price/Cash Flow Ratio, and

at least one item of intellectual property data selected from the group
20 consisting of Patent Number, Inventor Name, Issue Date, Title, Inventor State, Abstract, Inventor Country, Claim(s), Attorney or Agent, Description/Specification, Assignee Name, Assignee State, Assignee Country, Issued US Classification, International Classification, Application Serial Number, Application Date, Primary Examiner, Assistant Examiner, Parent Case Information, Related US App. Data,
25 US References, Reissue Data Foreign References, Foreign Priority, PCT Information, Government Interest, and Application Type.

8. The method of claim 3, further including the step of constructing a search query having both financial search criteria and intellectual property search criteria.

9. The method of claim 8, wherein the step of constructing a search query
30 having both financial search criteria and intellectual property search criteria is facilitated by the step of displaying a search construction interface to a user.

10. The method of claim 4, wherein said step of combining the results of the financial database searching step and the intellectual property database searching step, further comprises accessing an assignee/ticker database to determine linkages between the financial database and the intellectual property database on a company basis.

11. A system for screening financial investment opportunities, comprising:
a computer platform responsive to user input including access to at least a financial database including data records associated with at least one company and an intellectual property database including data records associated with at least one company;

programmable search software, operable by said computer platform, for searching the financial database for data records associated with at least one company based upon a financial search criteria and retrieving the results thereof for storage in a first memory, said programmable search function also being employed for searching the intellectual property database for data records associated with at least one company based upon an intellectual property search criteria and retrieving the results thereof for storage in a second memory;

search analysis software, operable by said computer platform, for combining the results of the financial database search and the intellectual property database search to determine common results; and

a display device for depicting the common results.

12. The system of claim 11, wherein said computer platform includes a client and a server interconnected by a network, and where the financial database and the intellectual property database are stored on devices accessible through said server.

13. The system of claim 11, further including means for automatically relaxing search criteria employed by the programmable search software so as to obtain a non-zero number of search results.

14. The system of claim 11, wherein said financial database includes records having at least one item of financial data selected from the group consisting of Stock Price, Price/Earnings Ratio, Current Ratio, Debt/Equity Ratio, Cash/Price ratio, Earnings per Share Growth-1Yr, Earnings per Share Growth-

1Yr, Insider Trades, Institutional Holdings %, Price/Book Ratio, and Price/Cash Flow Ratio, and

where said intellectual property database includes records having at least one item of intellectual property data selected from the group consisting of Patent
5 Number, Inventor Name, Issue Date, Title, Inventor State, Abstract, Inventor Country, Claim(s), Attorney or Agent, Description/Specification, Assignee Name, Assignee State, Assignee Country, Issued US Classification, International Classification, Application Serial Number, Application Date, Primary Examiner, Assistant Examiner, Parent Case Information, Related US App. Data, US
10 References, Reissue Data Foreign References, Foreign Priority, PCT Information, Government Interest, and Application Type.

15 15. The system of claim 11, wherein said display device is suitable for the display of at least one user-selectable data item to assist with the construction of a search query having both financial search criteria and intellectual property search criteria.

16. A method for processing a search request having financial search criteria, comprising:

receiving results from a financial database having at least one data record
20 corresponding to the financial search criteria;

determining that the search request includes intellectual property search criteria;

filtering said results for data records corresponding to said intellectual property search criteria; and

25 presenting said filtered results.

17. A method for processing a search request having intellectual property search criteria, comprising:

receiving results from an intellectual property database having at least one
30 data record corresponding to the intellectual property search criteria;

determining that the search request includes financial search criteria;

filtering said results for data records corresponding to said financial search criteria; and

presenting said filtered results.